# Compliance Training with SCORM

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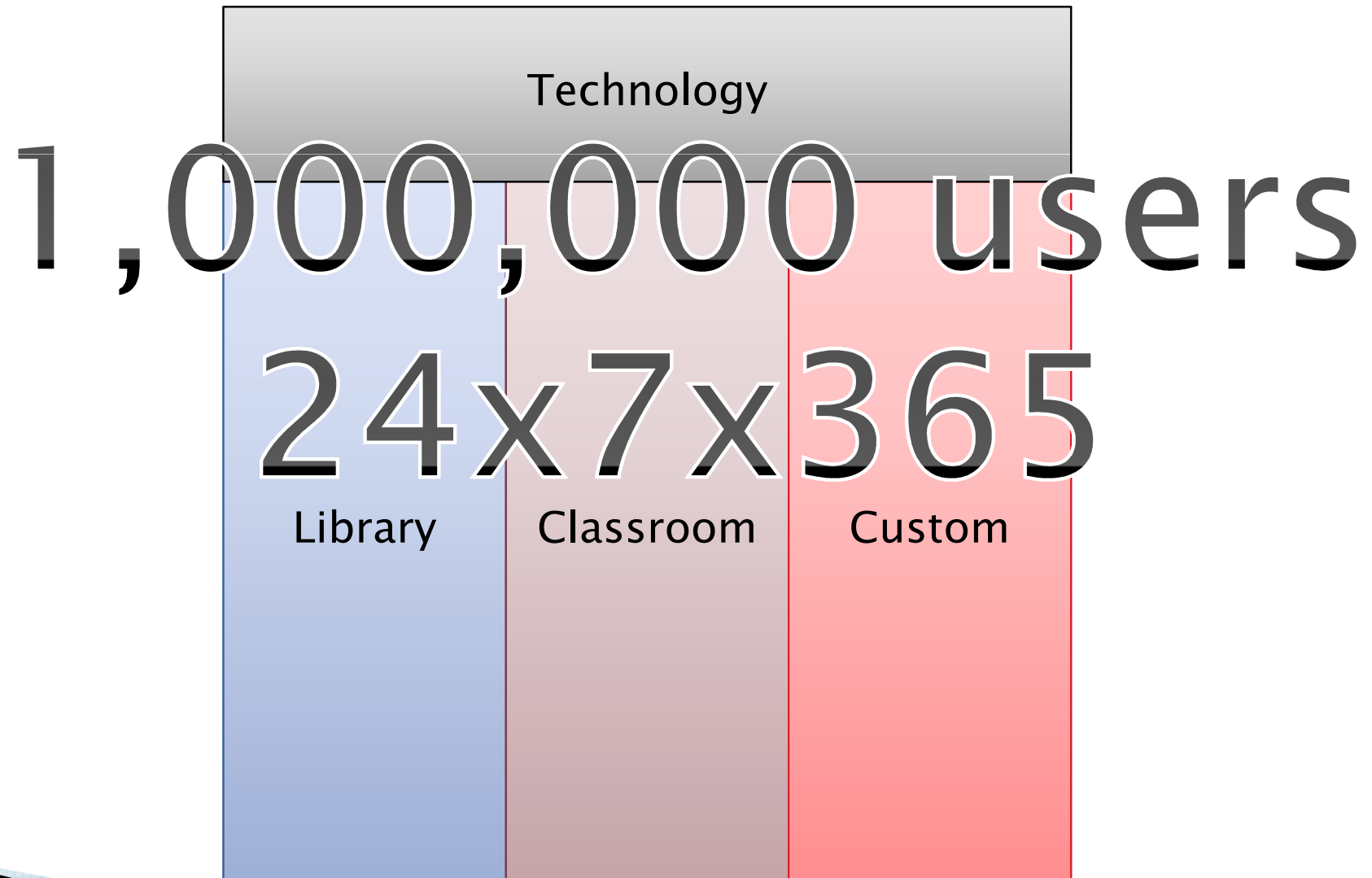koloughlin@intuition.com

# Overview

- Introducing Intuition
- Mobile Learning Platform
- SCORM on Mobile
- Case Studies:
  - Merrill Lynch / Bank of America
  - Accenture
  - Barclays Capital
- Take Aways

INTUITION

# Intuition Business Units



Technology

1,000,000 users
24x7x365

Library     Classroom     Custom

INTUITION

# Clients and Partners

# Some Facts about Smartphones

- Smartphone Sales are growing VERY fast
  - Gartner: Worldwide Smartphone Sales Grew 49% in Q1 2010
  - Now account for 17% of all mobile phone sales
- Convergence is a myth
  - Symbian, Android, iPhone, BlackBerry, WebOS
- Even Banks are allowing choice
  - Standard Chartered and iPhone for Bankers
- 'Content as App' – a good proof of concept

- Google has changed the way we think about and access information

- Google: 3 modes of mobile access
  - "Bored Now"
  - "Repetitive Now"
  - "Urgent Now"

- Google: Desktop PC's irrelevant within 3 years

INTUITION

# Some Facts about Mobile Learning

- We're already depoying at scale
  - Merrill Lynch – 22,500 users
  - Bank of America – 55,000 users
  - Barclays Capital – 19,000 users
- It extends existing eLearning systems
  - Fully integrated with LMS, HR systems
  - Utilises existing assets, tools
- Already deploying against multiple platforms

INTUITION

# So what was SCORM about ?

- The Sharable Content Object Reference Model, integrates a set of related technical standards, specifications, and guidelines designed to meet SCORM's high-level requirements — *accessible, reusable, interoperable, and durable content and systems*.
- In reality SCORM made provision for the Smartphone

INTUITION

# Intuition Mobile Fundamentals (2006)

- **Mobile but Untethered**
  - Everything available on-device
- **SCORM**
  - Reuse of assets and objects
  - Separation of Player and Content
  - Build content once Deploy on all platforms
- **Fully integrated**
  - Legacy LMS, HR, BES systems
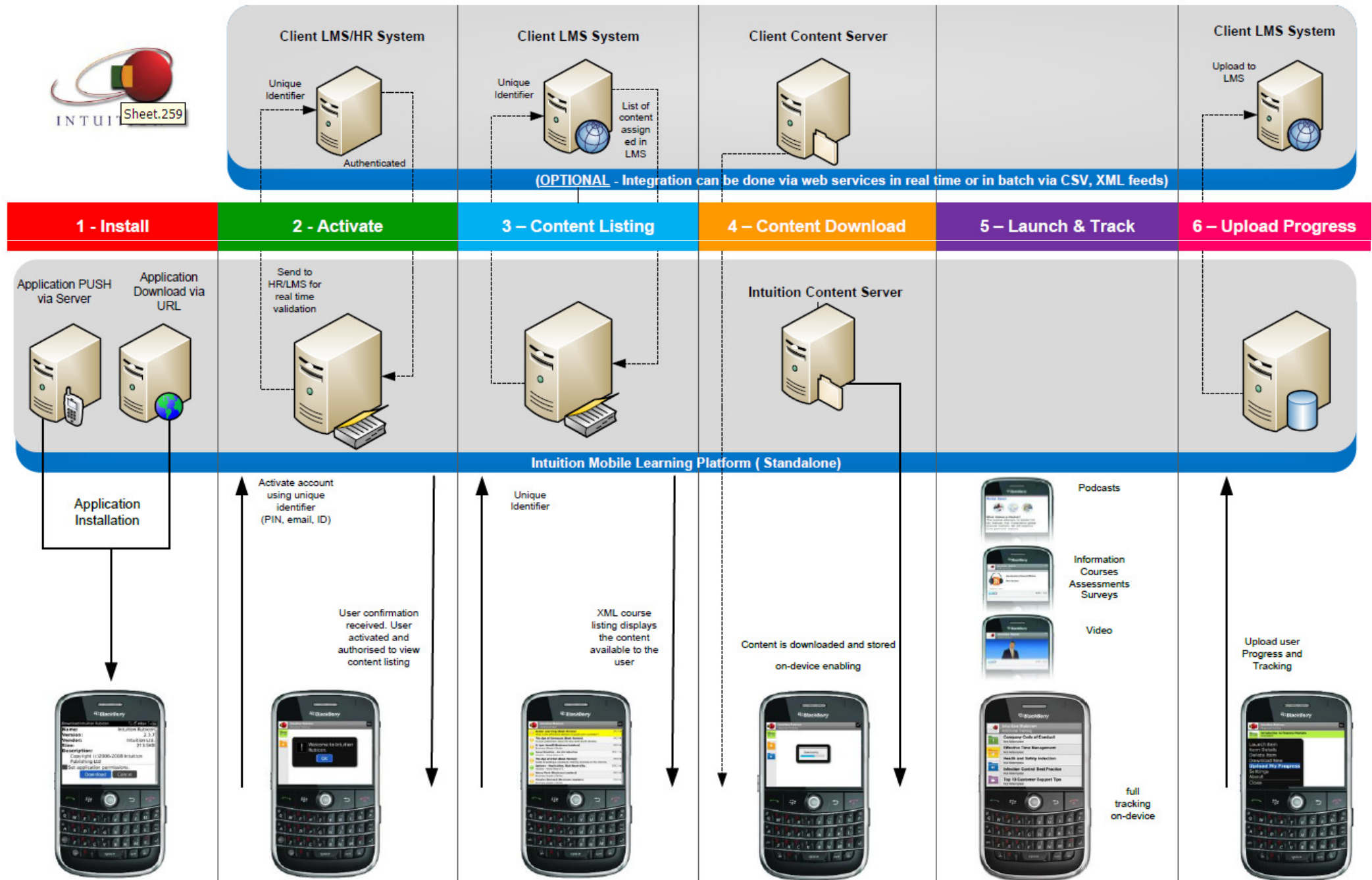- **Don't assume – measure**
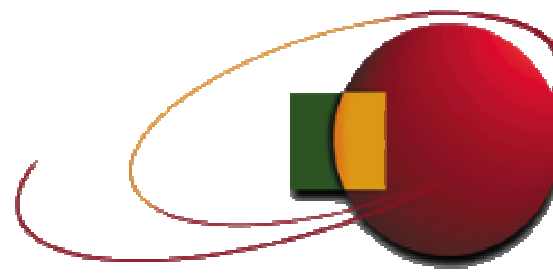  - Back channel from the user/device

INTUITION

# Intuition Platform

- On Device, Standards Based
- Guaranteed Delivery
- Push and OnDemand
- Personalised
- Auditable

DELIVERED

INTUITION

# Intuition Mobile Learning Platform – Server and Application

INTUITION

Sheet.259

**Client LMS/HR System**

Unique Identifier

Authenticated

**Client LMS System**

Unique Identifier

List of content assigned in LMS

**Client Content Server**

**Client LMS System**

Upload to LMS

(OPTIONAL - Integration can be done via web services in real time or in batch via CSV, XML feeds)

| 1 - Install | 2 - Activate | 3 – Content Listing | 4 – Content Download | 5 – Launch & Track | 6 – Upload Progress |
|---|---|---|---|---|---|

Application PUSH via Server

Application Download via URL

Send to HR/LMS for real time validation

**Intuition Content Server**

Intuition Mobile Learning Platform ( Standalone)

Application Installation

Activate account using unique identifier (PIN, email, ID)

Unique Identifier

Podcasts

Information
Courses
Assessments
Surveys

Video

Upload to LMS

User confirmation received. User activated and authorised to view content listing

XML course listing displays the content available to the user

Content is downloaded and stored

on-device enabling

Upload user Progress and Tracking

full tracking on-device
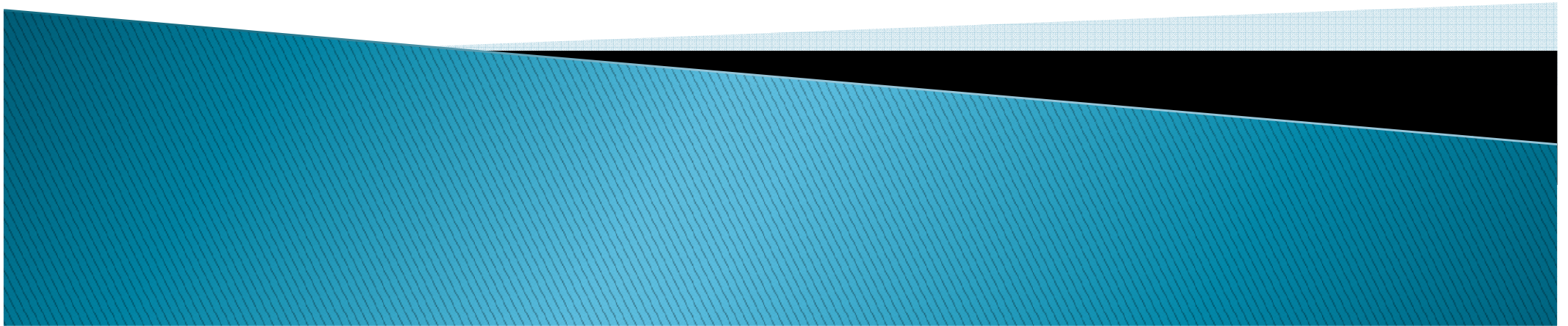
# SCORM on Mobile

# SCORM Challenges on Mobile

- We can't do this/that!
- No Pop-ups / Listeners
- Limitations of Mobile Browsers
- Devices/Capabilities challenge
- JavaScript
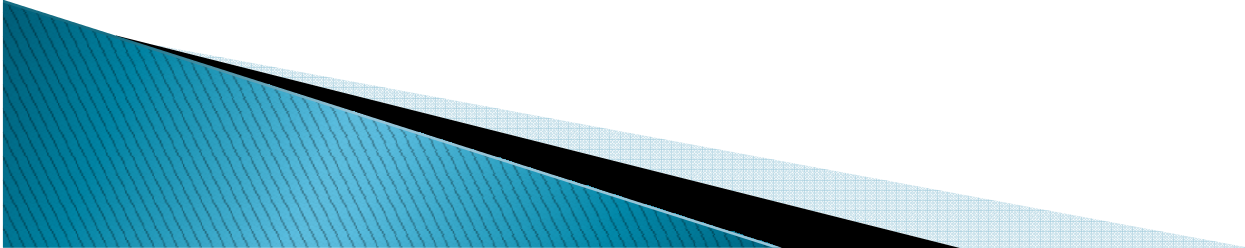- Lack of Flash Support
- SCORM is a necessity not a Luxury

# Authoring: Evolution, not Revolution

- Three Stage Process SCORM Authoring:
- HTML Templates
  - Dreamweaver, FrontPage
- Intuition Publisher
  - Export as eLearning or mLearning
- Support for Industry Authoring Tools
  - SumTotal ToolBook
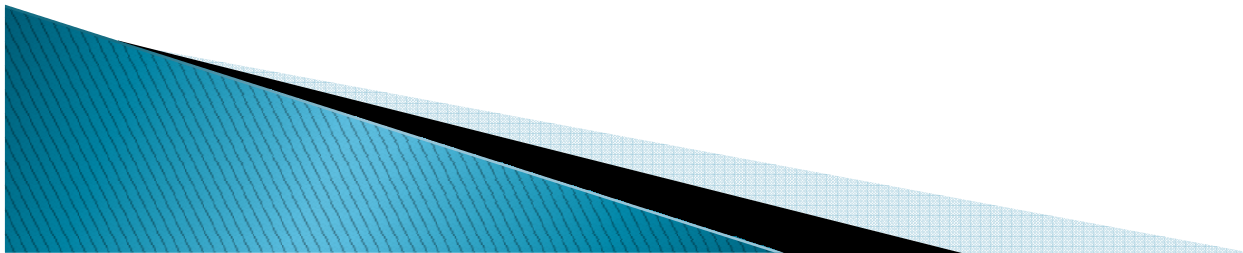
# Authoring Capabilities: SCORM

- Skills Gap
  - User focused content
  - Assess user level and provide appropriate content
- Two Way Interactivity
  - Assessments: Randomised Question Banks
  - Surveys: Push
- Media
  - Text/Graphics
  - Animation/Video/Audio Embedded
- Branching
- Scenarios

# Content is King...

- Training Courses
- Step-By-Step / How-To
- Just in time briefings
- Two Way
- Interactive
- Videos

Profile

- Surveys
- Assessments
- Skills Profiling
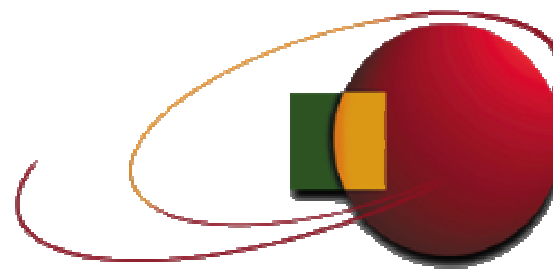
# Case Studies
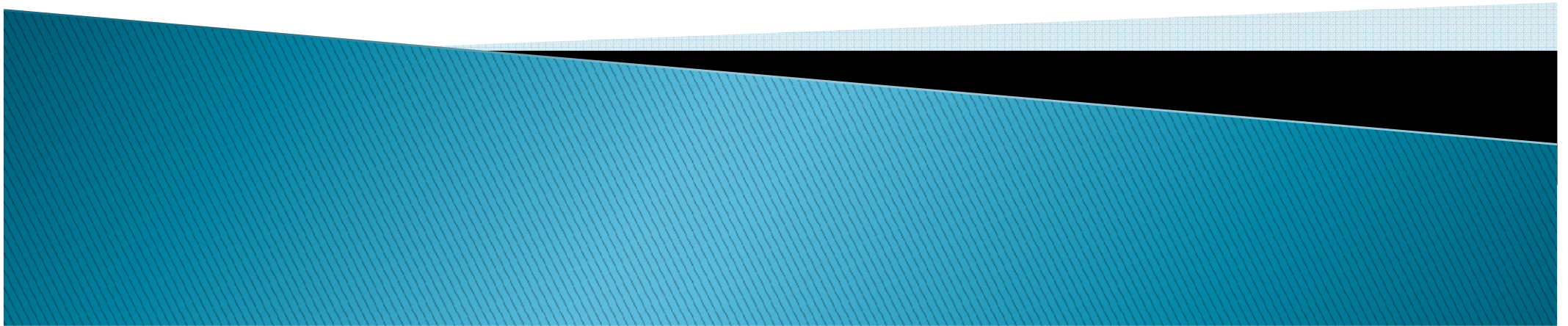
**Driver:** Provide a more convenient medium for training
Geographically dispersed and highly mobile
workforce

**First steps:** Pilot of 3 SCORM courses made available
BlackBerry, Windows Mobile audience
Full integration with LMS (SumTotal)

**Results:** Scored 4.5 on 5 point scale
(similar eLearning courses scored 4.1)

**Where now:** iPhone player added to Apple AppStore
White labelled player core to their client offering
Using offshore resources to build mobile content

**BARCLAYS CAPITAL**

**Driver:** Leverage user's perceived downtime for learning
Compliance

**First steps:** Diverse pilot audience of 4,100 employees
Full rollout to 19,000 Users
Compliance buy-in
Full integration with LMS (Cornerstone)

**Results:** No degradation in Learning
High user satisfaction – users wanting more!
Won awards for Compliance Innovation

**Where now:** Looking at Content to Support Business Units
Podcasts and Video

**Bank of America** **Merrill Lynch**

**Driver:** Delinquency in compliance training

**First steps:** Pilot of 3 SCORM courses to 2,100 Investment Bankers
Executive buy-in
Risk, Compliance and IT involved early

**Results:** No degradation in Learning effectiveness
Completion of compliance 20 days ahead of deadline
4,100 hours of extra productivity
Won Awards for Innovation
99% User Satisfaction

**Where now:** **Rolled out within Bank of America**
Full integration with LMS (Proprietary)
Rollout to all 55,000 BlackBerry Devices
LARGEST EVER deployment of a corporate application
on mobile
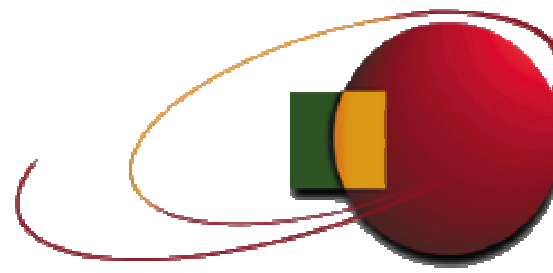
# Case Study: Merrill Lynch Deep Dive
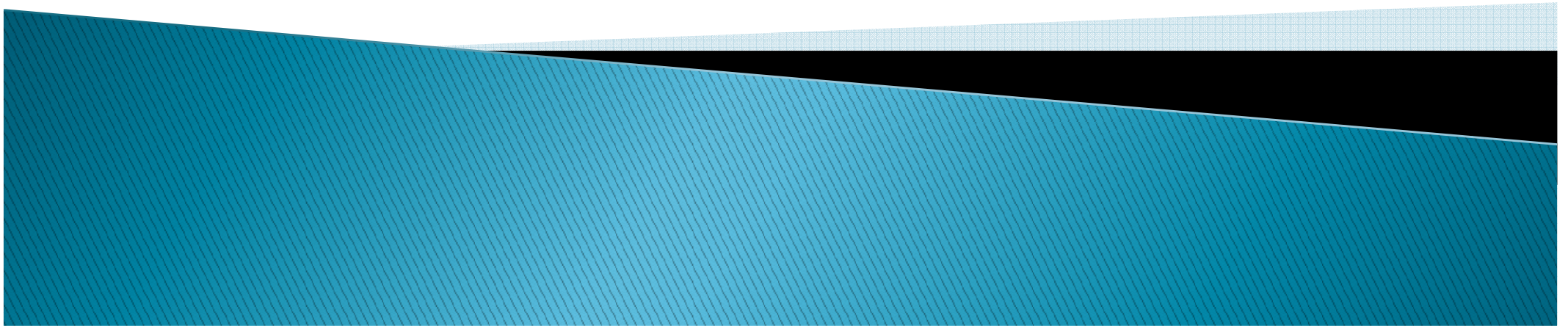
# The Idea

- Facilitate learning outside of the office
  - during 'naturally occurring' down time such as daily commuting or on business trips
- Leverage existing BlackBerry usage levels
- Enable people to learn in smaller bursts
- Offer learning over variety of mediums to meet individual needs and preferences
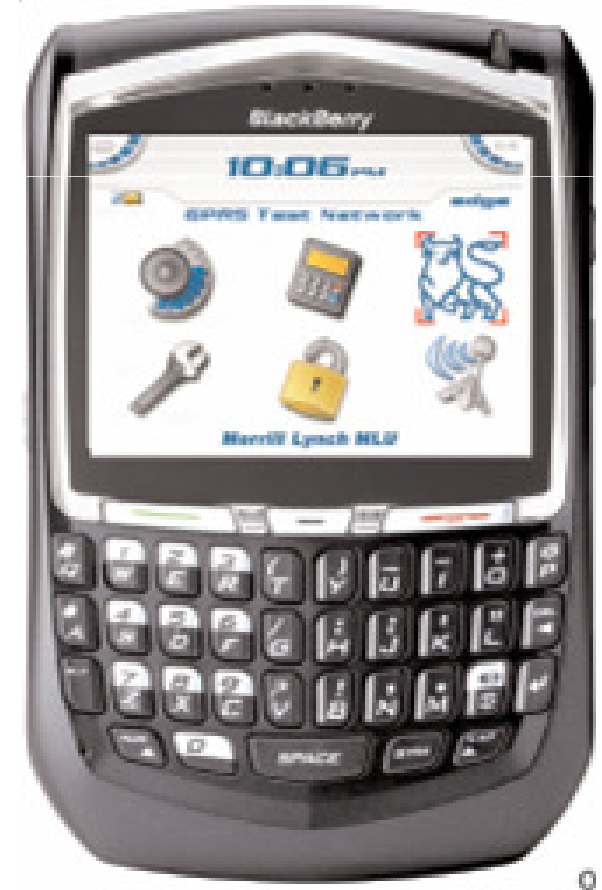
# Pilot Objectives

- Offer certain mandated courses via both MLU and BlackBerry
  - Establish standards for courses delivered via BlackBerry:
  - Prove out access, usage and effectiveness of learning delivered via BlackBerry to global population
- Deliver training with no degradation to learning effectiveness
  - Achieve 25% eligible participation
  - Achieve a comparable average score to the control groups
  - Obtain a 10% higher completion rate in 10% less time

# Design Considerations

**Course Access**

*STANDARD eLearning Delivery...*
MLU via Desktop
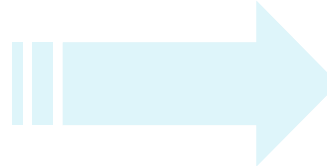
*Transformed for BlackBerry*
BlackBerry LMS in Applications
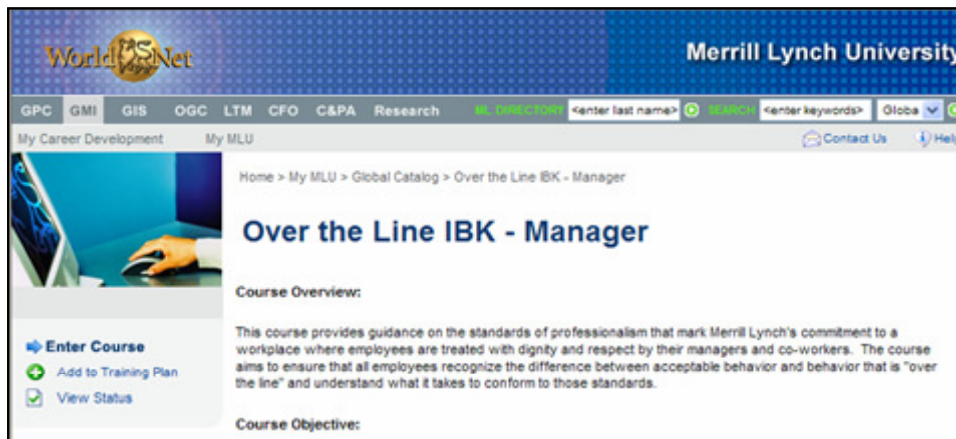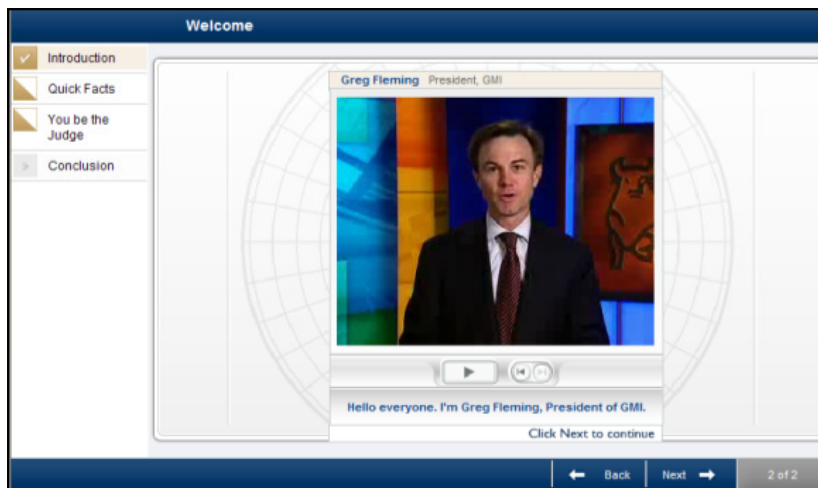
# Content Adaptation

## Course Introduction

*STANDARD eLearning Delivery…*
Executive video message
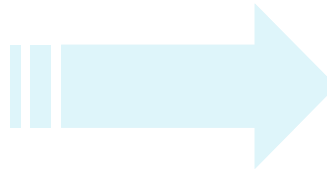
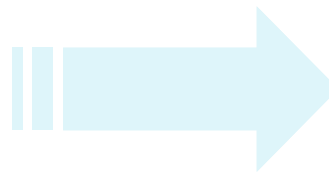*Transformed for BlackBerry*
Executive photo with text
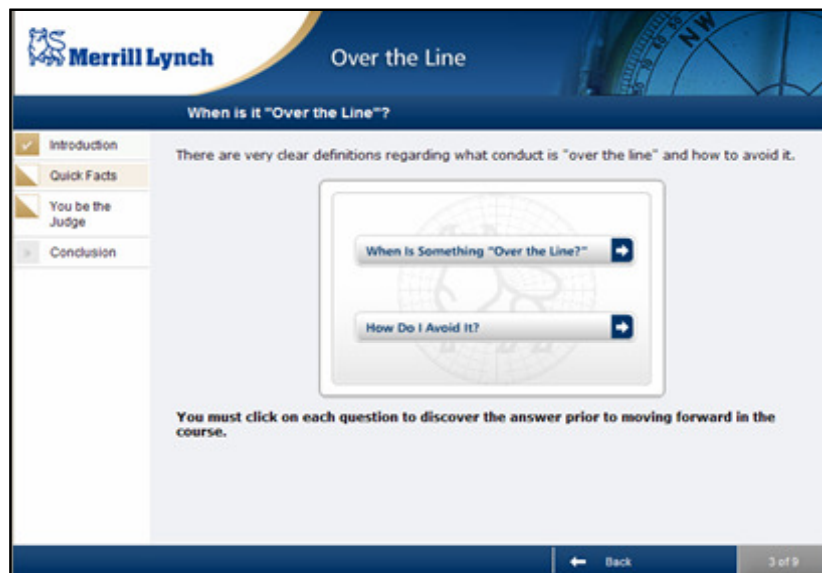
# Transformed Behaviour

**Presentation of Content**

*STANDARD eLearning Delivery…*
Animated build with additional
information in pop-ups

*Transformed for BlackBerry*
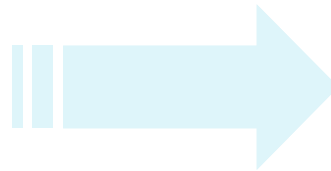Text presented top to
bottom with scrolling

# Scenario Presentation
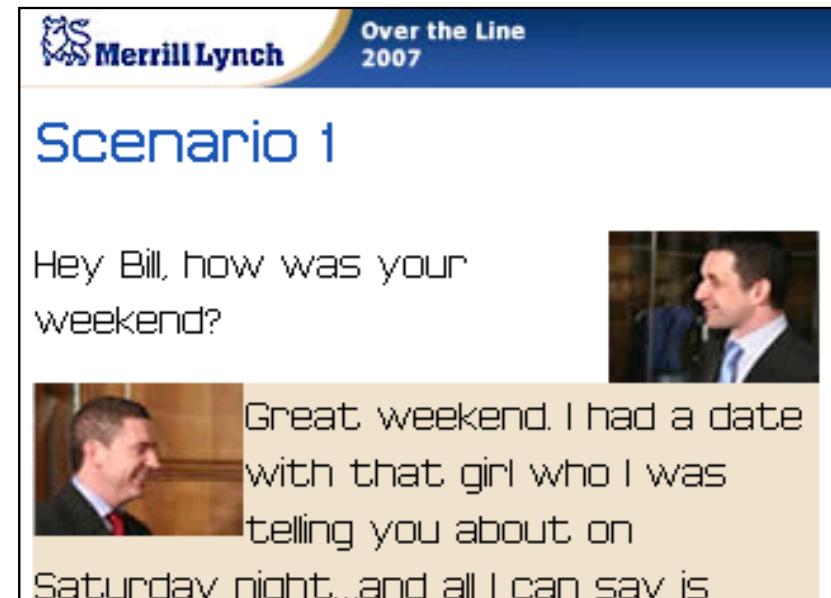
**Scenario Presentation**

*STANDARD eLearning Delivery...*
High-fidelity presentation –
audio with timed photos and
transcript

*Transformed for BlackBerry*
Low-fidelity presentation –
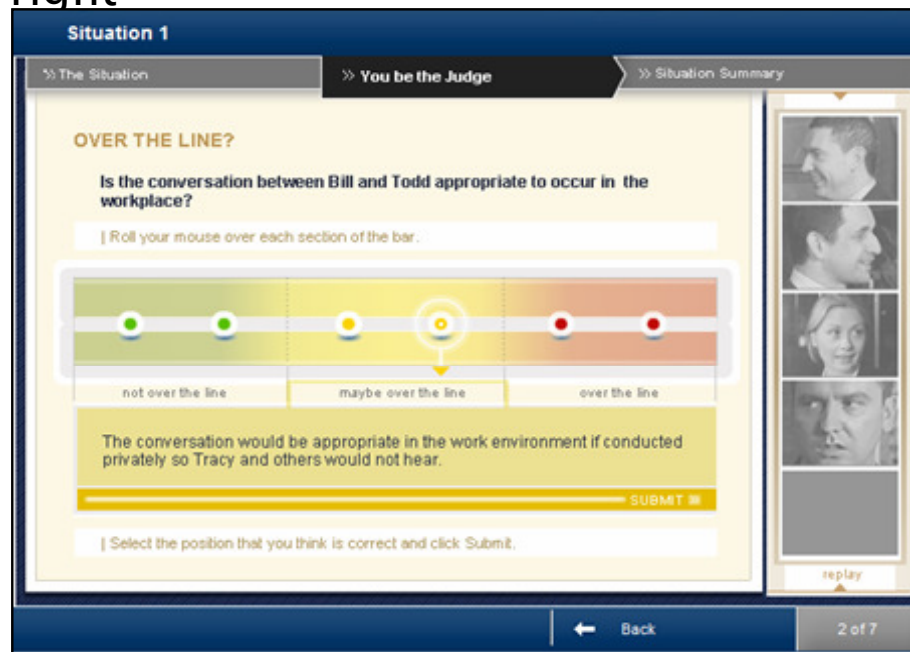transcript with pictures top to
bottom

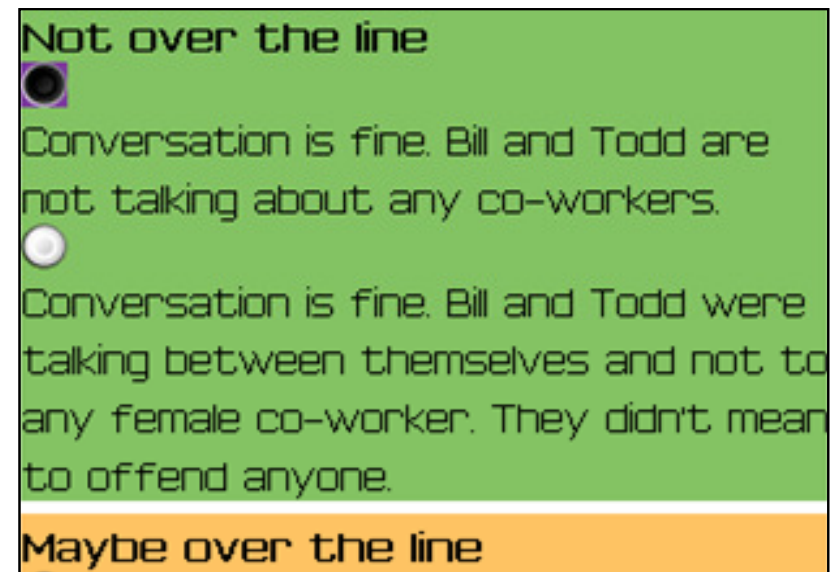# Assessments & Surveys

**Interactions**

*STANDARD eLearning Delivery...*
Answer choices reveal via mouse-over buttons, presented left to right

*Transformed for BlackBerry*
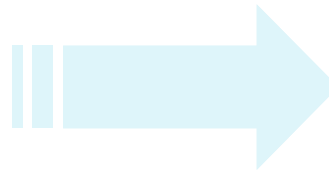Series of radio buttons top to bottom with all choices displayed
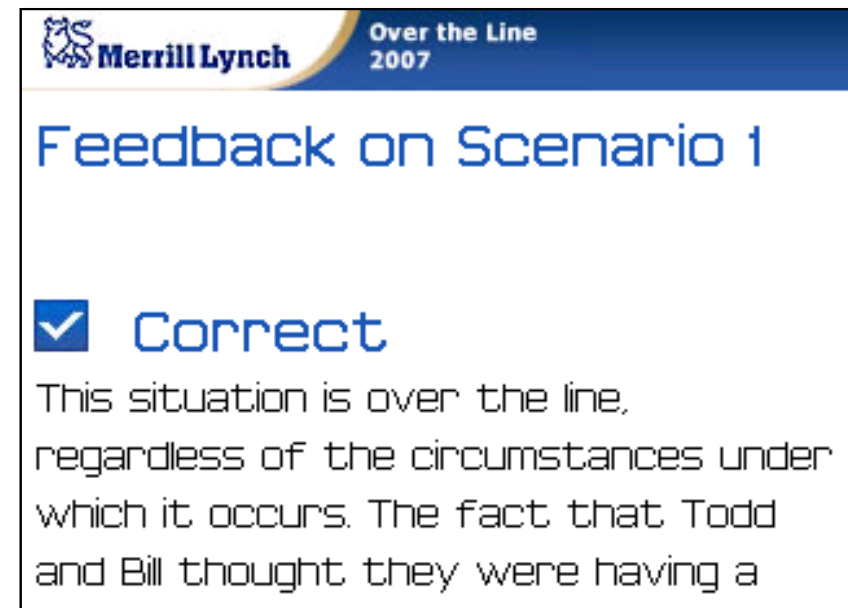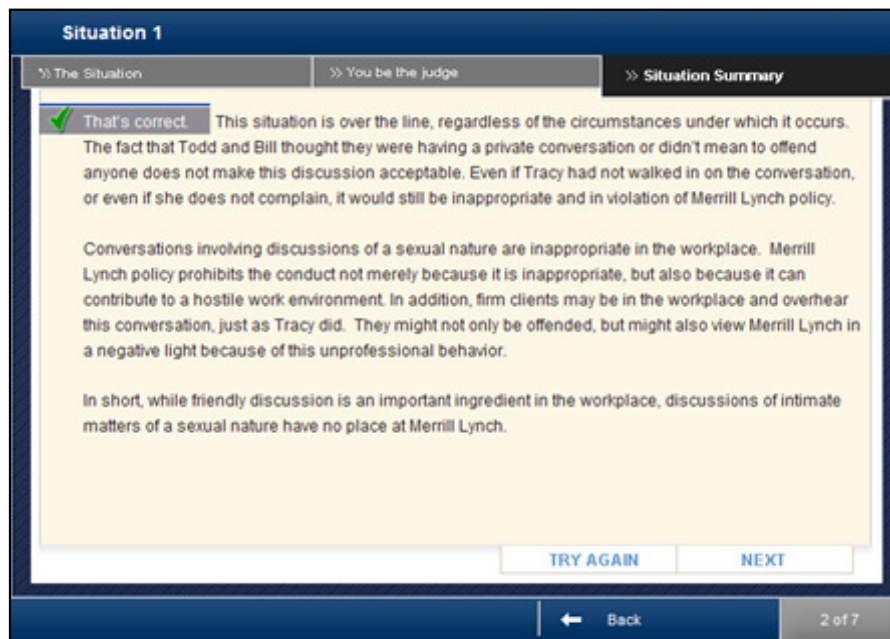
# Remediation

## Remediation

*STANDARD eLearning Delivery...*
No scrolling with an option to
replay scenario

*Transformed for BlackBerry*
Scrolling with an option to
replay scenario

# Internal Marketing

- ✓ Branded as "GoLearn"

- ✓ Marketed as a new way to "take your training with you" with travel related imagery

- ✓ Focused on the "learn when you can" benefit and "make the most of your time" message

- ✓ Announcements delivered from regional IBK heads emphasizing the importance of training through the new mobile medium

- ✓ Conducted roadshows key adopter groups

# GoLearn Pilot Goals 100% Achieved!

- ✓ Offered 3 mandated courses via both MLU and BlackBerry

- ✓ Established standards for courses delivered via BlackBerry

- ✓ Proved out access, usage and effectiveness of learning delivered via BlackBerry to global population

  - ✓ Delivered training with no degradation to learning effectiveness

  - ✓ Achieved 61% eligible participation

  - ✓ Achieved a comparable average score to the control groups

  - ✓ Obtained a 12% higher completion rate in 30% less time than comparable mandated training programs

# GoLearn Pilot Results – Scores & Time in Training

▸ GoLearn – higher scores in half the time.  Bankers who completed training via GoLearn completed the training in 54 less minutes and tested higher on final assessment tests that the rest of the firm.

| Metric | Results |
|---|---|
| Average Score | GoLearn test results averaged over **1% higher** than the firm wide average.  Lower overall scores were achieved on the one course not available via GoLearn.<br><br>|  | GoLearn Avg. | Firm Wide Avg. | Variance |<br>|---|---|---|---|<br>| Over the Line | 95.05% | 43 min | 13 min |<br>| Information Risk | 95.72% | 47 min | 24 min |<br>| Anti-money Laundering | NA | 60 min | NA |<br>| E-Communication Awareness | No Test | 32 min | 17 min | |
| Total Time in Course | GoLearn provided high impact training in **45% less time** than the equivalent MLU training.<br><br>|  | GoLearn Avg. | Firm Wide Avg. | Variance |<br>|---|---|---|---|<br>| Over the Line | 30 min | 93.70% | 1.35% |<br>| Information Risk | 23 min | 94.66% | 1.06% |<br>| Anti-money Laundering | NA | 89.99% | NA |<br>| E-Communication Awareness | 15 min | No Test | No Test | |

# GoLearn Pilot
# Results – Participation & Response

▸ Over a 7 week period, GoLearn was wirelessly "pushed" globally to over 2100 Investment Banker & select support BlackBerry devices. VPs and higher leveraged GoLearn the most.
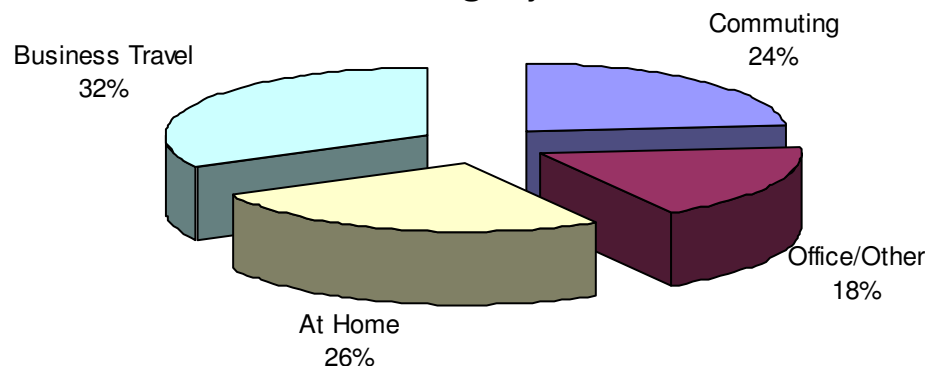
**61% of enabled employees (2100 total) launched GoLearn at least once**
- ✓ **317 people completed a total of 704 courses**
- ✓ **14% of IBK completed the available training via GoLearn**
- ✓ **980 used GoLearn yet did not complete a course**

**170 Survey Responses indicating:**
- ✓ **99% felt the format and presentation support the learning**
- ✓ **100% would complete more training in this format**
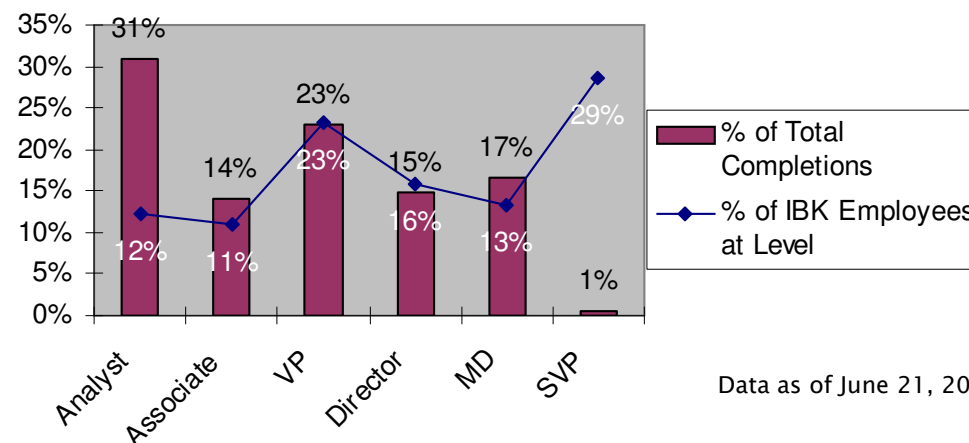- ✓ **Over 75% praised "convenience," "time management," and "training with no distractions" benefits**

**GoLearn Usage by Region**



**GoLearn Usage by Location**



- Business Travel 32%
- Commuting 24%
- At Home 26%
- Office/Other 18%
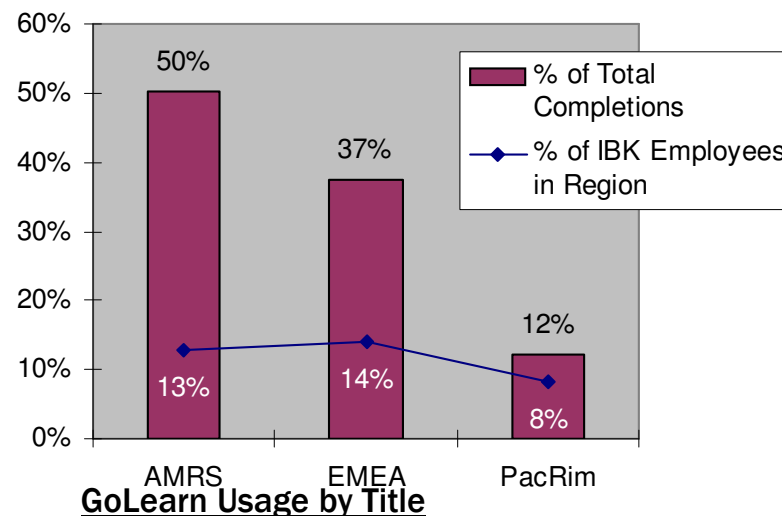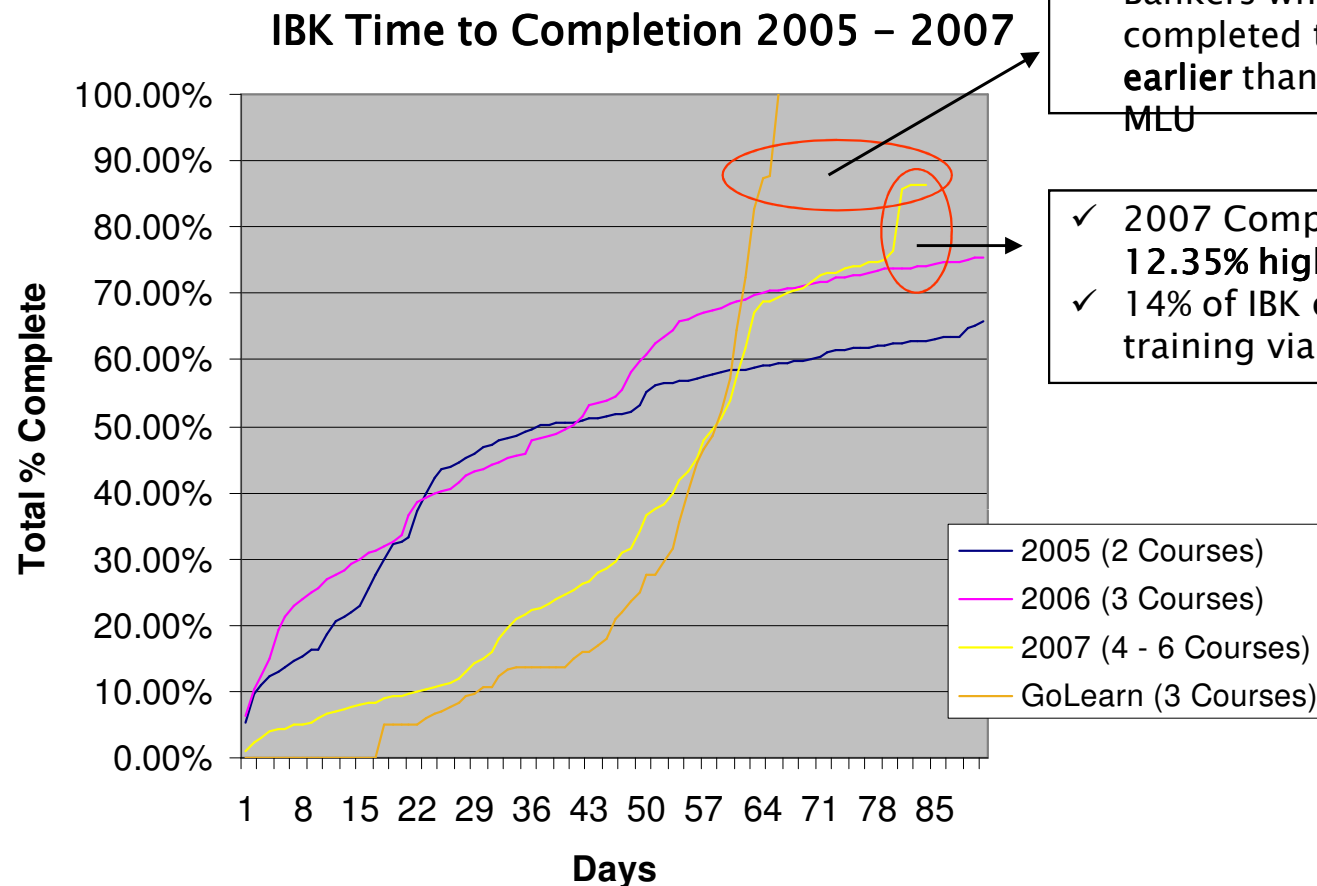
**GoLearn Usage by Title**



Data as of June 21, 2007

33

# GoLearn Pilot Results – Impact on Mandated Training

▸ While mandatory training from previous years had higher initial completion percentages, GoLearn helped push final IBK completion rates 12% higher than previous year in 70% of the time.

**IBK Time to Completion 2005 – 2007**

✓ Bankers who trained via GoLearn completed their training **20 days earlier** than those who trained via MLU

✓ 2007 Completion at 85 days is **12.35% higher** than 2006
✓ 14% of IBK completed the available training via GoLearn



Chart — Total % Complete (y-axis, 0.00% to 100.00%) vs Days (x-axis, 1 to 85)

Legend:
- 2005 (2 Courses)
- 2006 (3 Courses)
- 2007 (4 - 6 Courses)
- GoLearn (3 Courses)

Data sources as of June 21, 2007:
2005: AML & Info Risk
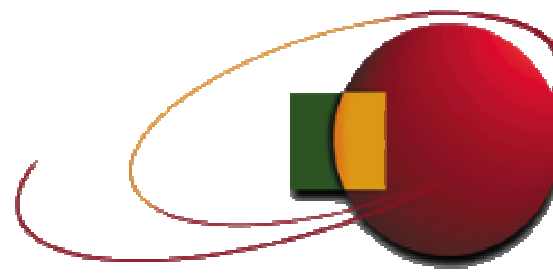2006: AML, Info Risk & E-Mail Awareness
2007: Firm Wide Annual Curriculum 2007
GoLearn: AML, Info Risk & E-Communications
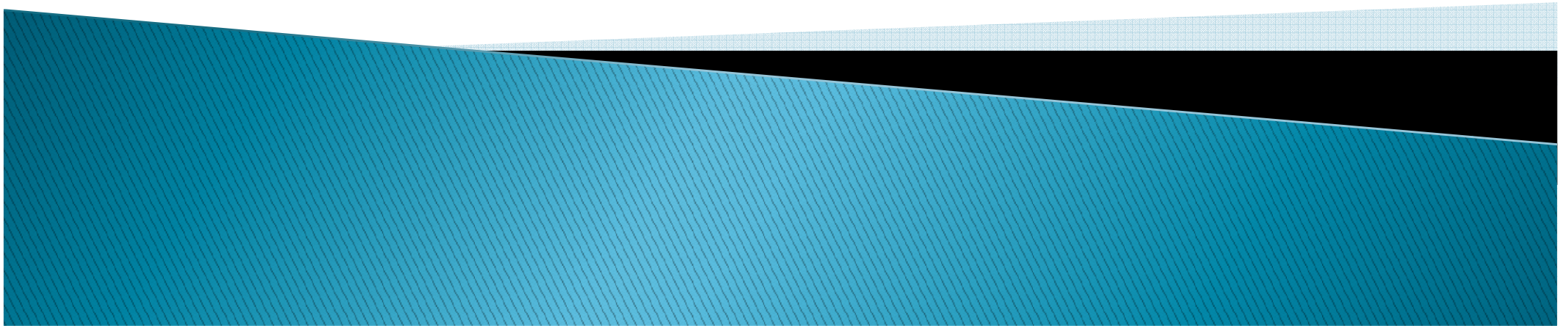
# Merrill Lynch: The Numbers

- 100% would access learning this way
- 99% satisfaction
- 82% accessed outside Office
- 50% less time
- 20 days earlier*
- 75% saving on authoring*

*When compared with eLearning

# Take Aways

# Haiti

# Accidental Revolution

- SMS was invented using a "test" protocol
- 2010: 4bn messages sent every day

- Smartphones weren't invented for learning  but…

Smartphones will change the way we learn forever

# Your Take Aways...

- Mobile Learning Works!
- Smartphone Based SCORM
- Fully tracked and audited
- Fully integrated
- Leverage Existing Content
- Win-Win
  - Users
  - Organisation